



NEPC, LLC

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Boston, MA 02109

To: The Honorable Leo T. Sorokin
United States District Court
John Joseph Moakley Courthouse
1 Courthouse Way
Boston, MA 02210

Date: August 20, 2018

From: Craig Svendsen, CFA

Subject: Ross McLellan

My name is Craig Svendsen and I have known Ross for going on 23 years. When I was 22 years old, I packed my car up and moved from Cleveland, Ohio to Boston. I knew only a couple people in Boston but nonetheless I wanted to experience living and working in a place much different from where I grew up.

I soon found a job and began my career. It was at this job where I met Ross. I was introduced to Ross by a colleague. A group of us would go to lunch on occasion and it was at those lunches and nights out after work where we quickly became good friends. It is hard to explain but from the onset of our friendship we were more like brothers than good friends and although I am only a few months younger than Ross, the relationship was more akin to a big brother/little brother relationship. I was the little brother.

As months and years have passed, what did not and has not changed is my admiration for Ross. While I have always tried to be there for him, what is certain is that he has always been there for me. I owe so much of what my life is to Ross. Below I have shared several stories involving Ross and me (there are many, many more). None of them on their own are a big deal, but it is such small actions that occur frequently over an extended period-of-time that show true character.

Several months after arriving in Boston, my roommate decided to move back to Florida. I felt as if I had no options for staying in Boston given the cost of living, what I was making in salary, and the fact that I knew very few people. As a result, I was considering moving back to Ohio. However, once Ross heard my situation he quickly took me in as one of his roommates. He did not know me well, but he knew I needed help – so he helped. Without him stepping in it is likely I would have moved back to Ohio after just having arrived in Boston several months earlier.

After a couple years, Ross and my other roommate became very serious with their girlfriends (their present-day wives) and decided to move out. Again, I wasn't sure what I was going to do,

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but once again Ross stepped in to help-out. He had another friend moving back to Boston from Baltimore. His friend had many options for where and with whom to live since he was originally from Boston, but Ross vouched for me and convinced him to become my roommate.

Ross was also present when I first met the woman who would become my wife. I had a long history of finding (stupid) reasons why not to pursue certain relationships. That is until we met Kristin. He basically told me you have no choice other than to ask her out. He knew she was perfect for me and he was not going to let me screw it up. I took his advice and 16 years later I am still happily married.

While I have left out much of the detail behind these stories it is true that none of these short stories involve some grand gesture. But the reason I tell them is because this is what life has been like for me since meeting Ross many years ago. Since literally day one, he has always looked out for me. When I needed a place to live or a roommate – he found one for me. When I needed encouragement, it was Ross who provided it. When I had nowhere to go for a holiday, he would take me with him to his parents. When I had nothing going on or he found out I was alone, he would have me over for dinner. When I was upset or needed a friend, it was to his house I would go. When I needed advice, it was his counsel I sought.

In addition to my longtime personal relationship with Ross, I also have had the good fortune of knowing Ross in a professional capacity. I worked for Ross at State Street from March 2000 through September 2004. In early 2000, Ross was looking to expand his team. Despite the risks of hiring a friend, he hired me because he knew I was right for the position. I too had an investment background and was familiar with working with Plan Sponsors given my previous experience. I really enjoyed working for Ross. He was always willing to share his knowledge yet he provided employees the space to develop their own style. From my perspective, he was always fair in his decision making even in those times when decisions didn't go my way. I believe my colleagues from that time would agree. Ross had an incredible ability to connect with clients. I learned a great deal from him in those years. My wife and I ultimately made the decision to move back to Ohio to raise our kids and that is the only reason I left State Street. I thoroughly enjoyed the years I worked at State Street for Ross.

As I have grown older, I have realized friends, even good ones, come and go. It is only the very special ones that stick for a life time. Despite my having lived in Cincinnati, Ohio for the past 13 years, to this day, every time I speak with Ross he is still checking on me. He is making sure that I am ok, always asking what he can do for me – and he does this no matter what might be going on in his life.

In closing, Ross is an amazing friend. I am so lucky to have had him in my life the past 23 years. I love him like a brother, love his family as my own and based on how what he has done for me and how he has been there for me over the years - I know he loves me back.

Thank you for reading. Craig

